

Meeting Highlights

EPMO SDLC Workgroup

DAY: Friday, January 7, 2011

TIME: 9:00 A.M. – 12:00 P.M.

LOCATION: Department of Insurance (Dobbs Building, 430 N Salisbury Street, Raleigh, Conference Room 2238) or Dial-In 919-212-3144

Meeting Called By:	SDLC Workgroup Members
Meeting Purpose:	Work with ITS Business Relationship Manager and Service Delivery Manager to discuss opportunities to incorporate Agile methods into the processes
Attendees: (*present)	Chris Cline, Community Colleges Beau Garcia, Department of Insurance LaQuita Hudson, Information Technology Services Paul Jarmul/Michele Jackson, Department of Revenue Ronda Jones/ Ann Tyndall, Department of Public Instruction Subhaparatha Sridharan, Department of Health & Human Services Linda Lowe/Gaye Mays, Statewide Enterprise Project Management Office Cheryl Ritter/Carolyn Broadney, Department of Transportation
Guests:	John Scanlon, Service Delivery Brian Layh, Business Relationship Management

Key Points Discussed:

- **Lessons Learned**

Subhaparatha Sridharan, Department of Health & Human Services, discussed points from Anthony Vellucci regarding lessons learned with the DHHS CRH project.

- **Guests John Scanlon, Service Delivery and Brian Layh, Business Relationship Management, participated in discussion about Agile for Software Development**

- Brian Layh, Business Relationship Management

- BRM team has agency assignments and they meet with their assigned agency to determine what is coming, any issues, concerns, etc. This team owns and maintains the Service Leave Agreement (SLA) between ITS and the agency.
 - Brian manages 8 people on the BRM team. BRMs are not project managers, They know how services are provisioned, what they are, how they are operated, pricing options, etc. Project Managers from the ITS PMO are generally only assigned when project cross many services and there needs to be a single point person. However, most services have service coordinators who serve as the point of contact.
 - Brian agreed that it would be beneficial for the BRM staff and other ITS teams to share more knowledge about Agile processes and methodology.
 - One service that the BRM can offer agencies is the ability to assist with determining necessary lead times to ensure a successful implementation.
 - If an agency is seeking service from multiple service areas, it may be useful to contact their assigned BRM for assistance in ITS coordination.
 - BRM owns the service catalog, but the service owner for each area owns the content contained in the service catalog.

- John Scanlon, Service Delivery
 - His team mostly handles product management
 - Placing a service request is generally the first point of contact for requesting ITS services.
 - Team is responsible for defining and managing the services provided by ITS for agencies
 - ITS PMO Project Managers are only assigned based on the complexity and number of services being touched by project.
 - Service Delivery team receives feedback from the BRM team regarding customer needs that may help to improve the quality of services offered.
 - ITS is seeking ways to simplify and move toward a model that simplifies customers service requests.
 - ITS desires to be notified of service requests as early as possible in order to position themselves better to meet customer needs.
 - John recommended that tickets for service requests are entered for each service individually to ensure each area is aware and can begin planning how to handle the service request.
 - There are current discussions underway regarding creating an online form for ordering service, which in turn could possible generate a remedy ticket.
 - When ITS PMs are assigned to a project, their services are at a cost to the requesting agency and a MOU is created detailing the services expected.
 - When project coordinators are assigned to a project, the requesting agency does not incur additional costs, but the time allotted for coordination would be much less than that allotted for an assigned PM.

Additional Discussion Detail

Process Confusion

- Forms/Flow - LaQuita asked which form she should use to interact with ITS. There are so many different variations for dealing with each service/group at ITS. Each group within ITS follows a different model (forms) and provisioning process. LaQuita requested a flowchart that clarifies what is required to navigate through the process to request and obtain services from ITS. Flow is not in the service catalog today. Really need this some place.
- Customer View - John Scanlon noted that no matter what you are doing, the first step is a service request (Remedy Ticket). As the customer, you shouldn't have to care about what form or procedure is used behind the scenes at ITS. ITS is looking at taking complexity out of some of the processes they use today to fix/improve legacy and process issues. Brian and John are willing to make it easier for customers to do business with ITS. They agreed that there is room for improvement here.
- Future Plans - ITS wants to move toward cloud computing and to move away from customizing each server for each project and agency. They hope to move toward "High-Medium-Low" requirements that are outlined on a service request web page – then "boom" the provisioning process starts behind the scenes.

Timing for ITS Engagement & Service Catalog

- Early Engagement - John suggested early engagement. The earlier you engage ITS, the better things will be. Longer lead times give more flexibility to do adequate provisioning, especially when vendors need to be engaged. Beau asked when the clock starts. Per John and Brian, server provisioning starts with 3002 signature. For networks and telecommunications, the clock starts when the request (Remedy ticket) is in.
- Expectations - Beau wants to drive toward clear expectations on all sides. An MOU (or SLA?) should set clear expectations in the beginning, outlining steps for Request, Requirements gathering, requirements vetting, build out, customer acceptance, signoff on 3002, etc.
- Beau asked about expected lead times for different service requests. Lead times (e.g. typically 45-60 days for circuits) are sometimes outlined in the service catalog description. However, the service catalog doesn't always provide information on lead times. Such information would be very helpful to project managers who need to rely on ITS services. When the clock actually starts and what actions could potentially stop the clock would also be valuable information.
- Brian will coordinate with content owners and work with the SDLC work group to address specific suggestions for areas for improvement.

Service Requests for Complex Projects

- Groups within ITS still operate as separate, individual services with little coordination across lines of business. Need coordination from the ITS PMO and the BRM team together to deliver results to agencies that need 4 or 5 services. The customer shouldn't have to figure out delivery of LAN, WAN, telephony or whatever separately with each operational group within ITS.
- Beau asked "who is the belly button"? Brian stated that BRMs can help answer when something can be done and how it happens. The BRM will engage ITS PMO as needed. For larger/complex projects the ITS PM is the belly button, otherwise the BRM is the person to contact if service issues arise.
- Linda gave an example for a current project that seems to be working at DOT. DOT's Next Generation Secure Driver License System (NGSDLS) had early involvement from the PMA, BRM, Agency PM, ITS PMO PM and an ITS Executive Sponsor during the Initiation process. The project governance model includes the ITS Executive Sponsor on the Steering Committee. PMA ensures that the BRM and ITS PMO Director are included on meeting minutes from monthly Agency CIO/Agency PMO/EPMO touch points to stay informed of upcoming projects and any issues with in flight projects. This model takes time to set up initially and seems to work. But it may not be appropriate for an Agile project that would typically be leaner (fewer people involved – pigs only) and require results sooner.

- **Discussion Points for Next (February) Meeting**

- **Discuss Agile project artifact requirements**
 - Focus on Non-registered projects (>\$500,000) first;

- Focus on Registered projects later
- **Workflow & Artifacts**
 - Which phase is the artifact due
 - Phase for draft documentation
 - Phase for final documentation
- **Guidance on determining project type**
 - What qualifications can be utilized to determine if a project fits Agile or Waterfall methodology (e.g. thought process, checklist? size? scalability? etc.)?
- **Involved parties - Who are the pigs and how do the chickens participate?**
 - How do other service areas, such as Enterprise Architect, BRM, Service Delivery, fit into the agile process
- **Agile and Current Workflow**
 - How can we begin utilizing agile practices in the current workflow to improve speed and delivery?

ACTION ITEMS / NEXT STEPS			
No.	Item	Assigned To	Status
1	Move meeting with Kathy Bromead to March	Gaye	Complete
2	Send agile articles Kathy submitted to PMAs to workgroup	Gaye/Linda	Complete
3	Begin draft of agile recommendations to jumpstart February meeting and Kathy meeting in March	Beau/Cheryl/ Gaye	Open
4	Review ITS service catalog and identify what is documented well, identify gaps (forms, flow, lead times, etc.) that are most painful to the agencies.	Linda/LaQuita	Open
5	Plug any holes in service catalog identified by work group. Get standard provision time, forms, flows provided by service owners where gaps exist after initial gaps are identified.	Brian	Open
6	Provide presentation on the process for hosting delivery and provisioning to workgroup	Brian Layh	Open
7	Send list of agency assigned account managers from BRM group	Brain Layh	Complete
8	Share presentation materials and offer to conduct presentation to Sharon's groups (perhaps BRM and Service Delivery) regarding agile methodology and processes. Sharon will determine who hears what information and when.	Linda	Open
9	Research possible speakers for future meetings to help group gain more knowledge on Agile viability and scalability.	Linda & Ann	Open